

VIGILANCER: System for Identifying Opportunities and New Gaps in the Market for the Ceramic Industry

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1. INTRODUCTION

When this initiative was first put forward, the ceramic sector was going through what was probably the worst, most critical period in its history. That was at the end of 2012. The analysis realized at that time showed that 2 key factors had caused this.

- The drastic fall in consumption. This was particularly severe in the national market, which has historically been responsible for around 60% of ceramic tile business.
- The steady decline in companies' profitability since the 1990s. This factor is not related to the previous one. In fact, the extraordinary volume of sales achieved before the global crisis obscured this reality, covering up what we can define as the crisis in the traditional ceramic business model.

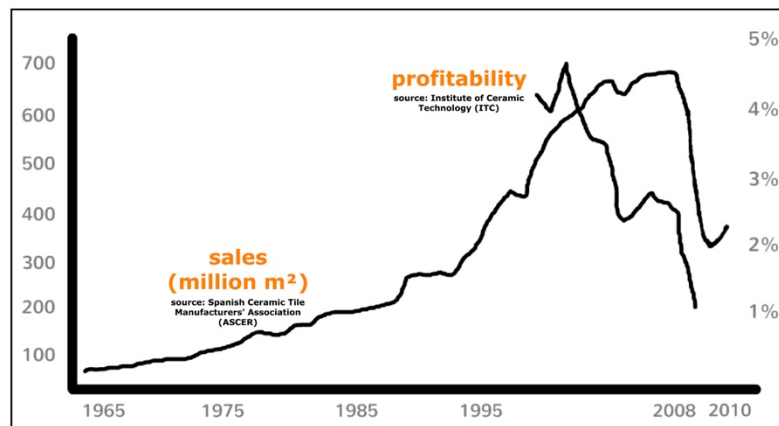


Fig. 1. Comparison of sectoral change in global sales vs. profitability
Source: Produced by the authors

This crisis in the business model means that, while a certain number of companies may be able to maintain their modus operandi, it will be crucial to make a break with the uniformity of business strategies. Businesses will need to diversify by incorporating innovative features which can transform this ageing business model.

With a mission to foster and strengthen these innovative features in the sector's businesses, and with Castellón Provincial Council's institutional support in making this vision a reality, the VIGILANCER initiative was born.

2. WHAT IS THE VIGILANCER SYSTEM?

VIGILANCER is a ground-breaking competitive monitoring system which was created in 2013, as a result of collaboration between Castellón Provincial Council and the Institute of Ceramic Technology (ITC)'s Competitive Intelligence department. Its purpose is to provide Castellón's ceramic industry with a strategic tool which enables it to stay ahead of the changes affecting the ceramic sector, and position itself to gain a competitive advantage in the global market.

More than 400 professionals from Spain's ceramic sector take part in VIGILANCER, most of whom hold strategic or management positions. This network of experts participates actively through opinion pieces and panel discussions in which they share their concerns and perspectives on the sector and its future. VIGILANCER therefore also acts as a meeting place, which can pool the ceramic industry's knowledge and generate dynamics of innovation between the various entities in the cluster.

The main fields it monitors are: the ceramic sector, international markets and competitors, distribution channels, consumers, construction, technology, innovation, architecture, urban planning, and design.

3. OUTPUTS

The system's main outputs include frequent, timely updates on sector-relevant content, the regular publication of reports on opportunities identified and analysed, as well as regular bulletins and special reports providing strategic information on hot topics.

The newsletter contains an editorial by a member of the network, analysis of the latest opportunities, and a selection of the most relevant content from the last fifteen days, organised into themes.

The latest report to be published was titled "Industry 4.0". It provides technical information on this concept and informs readers on how this technological trend is playing out in the sector, through interviews with people closely involved in this field.



Fig. 2 Front page and Contents of the special report on Industry 4.0

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